

DD/S 70-3278

06 AUG 1970

MEMORANDUM FOR: Executive Director-Comptroller

SUBJECT : Legislation Pertaining to the CIARDS  
Retirement Quota

1. The purpose of this memorandum is to advise you of the urgency of the requirement that our proposed legislation to either waive or increase the CIARDS quota for the period FY 1970 through FY 1974 be submitted as soon as possible.

25X1A 2. In Fiscal Year 1970, [redacted] persons retired (voluntary, involuntary, and mandatory). An additional [redacted] quota retirements were effected in July 1970 and [redacted] individuals have signed applications for retirement during the next few months. Projected mandatory retirements for the remainder of Fiscal Years 1971 through 1974 total [redacted] for which quota allowances must be considered as already committed. Thus, used or committed quota retirements now equals [redacted] "non-committed" spaces are available through the end of Fiscal Year 1974 to accommodate voluntary and involuntary retirement of individuals not now scheduled for mandatory retirement in that time period. In FY 1970 there were [redacted] voluntary and involuntary retirements. It is obvious, therefore, that without any controls being exercised we will exhaust all non-committed quota by the end of FY 1971.

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3. The Agency relies heavily on the assumption that CIARDS will continue to play a significant role in reducing ceiling overages facing us for the future. The assurance that this management instrument can be depended upon must be confirmed as soon as possible. If we cannot plan on quota relief in this Fiscal Year, I believe we will have to consider alternative actions to husband what quota we have. Among the actions that may have to be considered are:



- a. No further "voluntary-involuntary" retirements (i.e., 25 years of service and under age 50).
  - b. No further credit for domestic qualifying service.
  - c. More liberal extensions even for mandatory retirements.
4. While the above are administrative measures that we can accomplish with some persuasion, I believe we have a real problem with those who wish to voluntarily retire after age 50 with the requisite years of service. While early voluntary retirement is "with the consent of the Director," the DCI is in an almost indefensible position should he deny that retirement because of quota restrictions. Some very solid and onerous issues could develop which would be quite unfavorable to the Agency. I think these factors are compelling reasons for early Congressional action.
5. Without early resolution of our quota problem, other amendments in the proposed Omnibus Bill could become somewhat academic. I propose therefore that the importance of these considerations are such that separate legislative initiative be taken immediately to have the quota question resolved either informally or by formal enactment of an amendment to our Act.

SIGNED R. L. Bannerman

R. L. Bannerman  
Deputy Director  
for Support

25X1A      OD/Pers, [REDACTED] (4 Aug 70)  
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Originator: /s/ Robert S. Wattles  
Director of Personnel

# DISPATCH

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PROCESSING ACTION

S-E-C-R-E-T

MARKED FOR INDEXING

Chiefs of Station and Base

X NO INDEXING REQUIRED

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ONLY QUALIFIED DESK  
CAN JUDGE INDEXING

FROM

Chief [REDACTED]

MICROFILM

SUBJECT

Liberalized Procedure for Discontinued Service Retirement

## ACTION REQUIRED - REFERENCES

1. BD 7310, dated 6 February 1970, announced a liberalized retirement procedure which was available to employees meeting certain age and service requirements. For easy reference, a listing of the principal provisions of BD 7310, is attached.

2. BD 7310 noted that the liberalized procedure would remain in effect through 30 June 1971, provided the overstrength situation on which it was based continued until then. It is now clear that the overstrength situation will continue until 30 June 1971. Consequently, any employee, regardless of career service, who is now eligible or will become eligible by that date, and who is interested in applying for retirement under the liberalized procedure, or who wishes to obtain additional information regarding eligibility, annuity, benefits, etc., should inform his Chief of Station or Base, who will in turn notify headquarters. The application or inquiry will be coordinated at headquarters with the responsible career service and the Office of Personnel, and the employee will be given pertinent guidance or instructions as soon as possible.

3. Chiefs of Station and Base are requested to bring the contents of this dispatch and its attachment to the attention of personnel who may be eligible to retire under the liberalized procedure.

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Attachment

CROSS REFERENCE TO	DISPATCH SYMBOL AND NUMBER	DATE
	Book Dispatch #7531	
	CLASSIFICATION	HQS FILE NUMBER
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Att. to  
BD 7531

Principal Provisions of BD 7310

1. To assist agencies to make adjustments in on-duty strength to conform to reduced personnel ceilings, the Civil Service Commission has liberalized the requirements for employees to qualify for discontinued service retirement under the Civil Service retirement system.
2. The Organization is making this liberalized retirement arrangement available to eligible employees who may be interested in applying for early retirement. Our internal procedures will differ in some respects, however, from those which are applicable generally. Normally, typical reasons which qualify an individual for discontinued service retirement benefits include abolishment of position and the operation of classical reduction in force programs. Under the liberalized approach as adopted for application by the Organization, any eligible employee may elect to accept discontinued service retirement and receive an immediate annuity, without regard to requirements such as the abolishment of his position. The liberalized procedures will be extended also to participants in the Organization retirement system who meet conditions of eligibility specified in paragraph 4 below.
3. An employee in the Civil Service retirement system is eligible to retire under the discontinued service option if he:
  - a. is 50 years of age or older and has completed 20 years of creditable Federal service, or
  - b. regardless of age, has completed 25 years of creditable Federal service.
4. An employee in the Organization retirement system is eligible to retire under a similar option if, regardless of age, he has completed 25 years of creditable Federal service, including 10 years of Organization service and 5 years of qualifying service. No reduction in annuity will be made for age.

5. Since the liberalized retirement procedures may be used only to assist the Organization in reducing the number of personnel on duty to the authorized strength, they may not be continued in effect indefinitely. Retirements under these procedures should therefore be scheduled to be effective in the near future, preferably not later than 30 June 1970. Employees who attain eligibility under the criteria specified above between 30 June 1970 and 30 June 1971 will also be able to retire under the discontinued service option when eligible, provided the overstrength situation on which the modified procedure is based still exists at the time of scheduled retirement.

6. Retirement under the liberalized procedures is at the option of the individual. To meet administrative requirements, however, it will be necessary in each case, after the employee has indicated his wish to retire under the option, for headquarters to request his resignation based on a determination that he is surplus to the needs of the Organization. The retirement will then be documented as a resignation in lieu of involuntary retirement. The Office of Personnel has given the assurance that, despite this necessary documentation, the new procedure is, in effect, another form of voluntary retirement and is not adverse in nature.